No Wrong Door Planning Advisory Group Meeting #4

Overview
Recommended Guidelines

- Hats off – think for the state as a whole, across consumer groups, agencies, programs, and organizations
- Content experts sharing expertise
- Check assumptions and jargon
- Watch for miscommunication
- Consumer/caregiver priority #1
- All participants on equal footing

Underlying Assumptions

- Changes in funding and policies/procedures will be needed
- Counties control financial eligibility process
- The need for LTSS may exceed the capacity of LTSS providers
- You are here as planners, not stakeholders
- The need for LTSS may exceed the funds available to provide support

"Rules of Play"

State/ Steering Committee	Planning Advisory Group
PAG input will be truly listened to and considered	Take off stakeholder hat and think for the whole
Decisions and the rationale behind them will be shared in a transparent and timely fashion	Be willing to do things differently (let go of, "we always do it this way…")
Won't ask the PAG to do duplicative work or "make work" (if something is already decided, own it)	Bring your expertise to the table – share what you know
Ensure that the PAG's work will lead to change (get to implementation)	Prioritize, prioritize, prioritize

Status of NWD Plan Components

Implementation Plan Section	Status	Notes
Vision and Mission	🟩	• Discussed and finalized at first PAG meeting. **Vision:** Coloradans with disabilities and older adults can easily obtain comprehensive information and streamlined access to personalized supports and services that promote dignity, respect, and freedom of choice from wherever they enter the system. **Mission:** Colorado's No Wrong Door system, through collaborative partnerships, increased communication, and shared technology, ensures that all Coloradans with disabilities and older adults are connected to the supports and services they need to live dignified and self-determined lives in the community of their choice, regardless of pay source.
Person-Centered Counseling	🟨	• Discussed at second PAG meeting. • Workflow processes to be developed during Year 1 of NWD implementation.
Streamlined Access to Public Programs	🟨	• Discussed at second PAG meeting. • Workflow processes to be developed during Year 1 of NWD implementation. • Decision needed about streamlining financial eligibility processes.
Public Outreach and Links to Key Referral Sources	🟩	• Discussed at third PAG meeting. • Referral sources and expected roles decided.
NWD Communication and Marketing Plan	🟨	• Discussed at third PAG meeting. • Target market research conducted in Year 1. • Decision about how best to market and create awareness based on target market research.
Stakeholder Engagement	🟥	• To be discussed at fourth PAG meeting. • Decisions needed on how to structure stakeholder engagement throughout implementation and beyond.
Governance and Administration	🟨	• To be discussed at fourth PAG meeting. • Ongoing discussions between HCPF and DHS continue through implementation.
Overall Plan Performance	🟥	• To be discussed at fourth PAG meeting. • Decisions needed on how to structure stakeholder engagement throughout implementation and beyond.

Connecting the Dots

March 2015: Ideal NWD Process and Systems

Topic	Summary of Input	Related Design Features
Ideal Process	• Outreach to get the word out that NWD exists • Ensure that those in regular contact with consumers know about and can refer to NWD • Triage early on and connect consumers to non-LTSS and/or crisis services as needed • PCC process that adheres to high standards • A truly warm handoff and follow up focusing on whether consumer's goals were met	• PR strategy in NWD marketing and communications plan • Marketing and communications plan strategy to "connect with consumers where they are" – including community groups, places of worship, public transit, and other community settings • PCC/PCT workflow that allows for referral out to non-LTSS and/or moving directly to receiving referrals at every stage of the process • Requirement that all delivering I&R/PCC/PCT be certified and trained • Workflow processes all include feedback loop to ensure follow up and quality assurance
Ideal System	• Working with same person throughout NWD process • Common application/ shared IT system • Follow up/quality assurance • Consistency/good customer service/ experience	• Network of Certified PCC/PCT to ensure delivery of customized content expertise and consumer connection • Network of Referral Sources and marketing strategies that connect with community groups to help ensure easy matching of consumers with advocates as needed/requested • Common app/system input will go to the IT team to inform system design • Quality assurance focus on consumer

Topics	Summary of Input	Related Design Features
		• Regional delivery structure and high-accountability of "franchisees"

March 31, 2015: The Core of the Work

Topics	Summary of Input	Related Design Features
PCC PCT	• Driving home that PCC/PCT means that, "consumers are in the driver's seat" and building out the implications of that • Set expectation of 24-hour turnaround for response • Developed clear, coherent staff profile for those delivering PCC and I&R • Consensus on need for certification and ongoing training/development	• PCC/PCT availability by phone (NWD regional entity) or in-person (Network of Certified PCCs/PCTs) • PCC/PCT workflow that allows for referral out to non-LTSS and/or moving directly to receiving referrals at every stage of the process • Attention being paid to ensuring that options presented are truly independent • Focus of quality assurance (and likely, NWD staff evaluations) being on monitoring consumer service and satisfaction
Streamlined Access	• Outlined data-sharing and IT functionality needs • Set criteria for what coordination of functional and financial eligibility should look like (timing, coordinated follow up, etc.)	• Data-sharing/functionality input will go to the IT team to inform system design • HCPF has started exploring the political feasibility and economic impact of co-location options • Structure outlined assumes that eligibility determination will be co-located

	• Weighed in strongly that some sort of co-located solution is what's wanted	

April 27, 2015: Relationships

Topics	Summary of Input	Related Design Features
Caregivers	• Identified and profiled 5 caregiver segments	• Priority target market segments and initial profiles which will serve as basis for NWD marketing and communications plan
Consumers	• Identified and profiled 7 consumer segments • Identified barriers to accessing NWD • Prioritized segments	• Initial profiles and messaging that will directly inform next stage of market research
Marketing Strategies	• Developed list of places in communities to reach market segments efficiently • Illuminated the need for both outreach targeted at consumers and general PR campaign to raise awareness	• Specific, discrete slate of the strategic marketing strategies that will make up NWD marketing and communications plan • The PR strategy will be in the "public outreach" section of the NWD plan
Referral Sources	• Refined who needs to be in each referral category (direct, indirect, custom) • Developed the equivalent of segment profiles for referral source types • Identified needed customizations	• The features of an effective "targeted education" marketing strategy (personal, highly customized, ongoing, allowing "behind the scene" access to build trust, etc.) • Information that crosswalks the referral sources with the market segments • The "Regional Referral Network" being specifically called out in the org structure to reflect its importance

	• Illuminated the need for NWD to deliberately build trust and credibility (not assume it)	• The majority of the content for the "Links to Key Referral Sources" section of the NWD plan

NWD System Structure

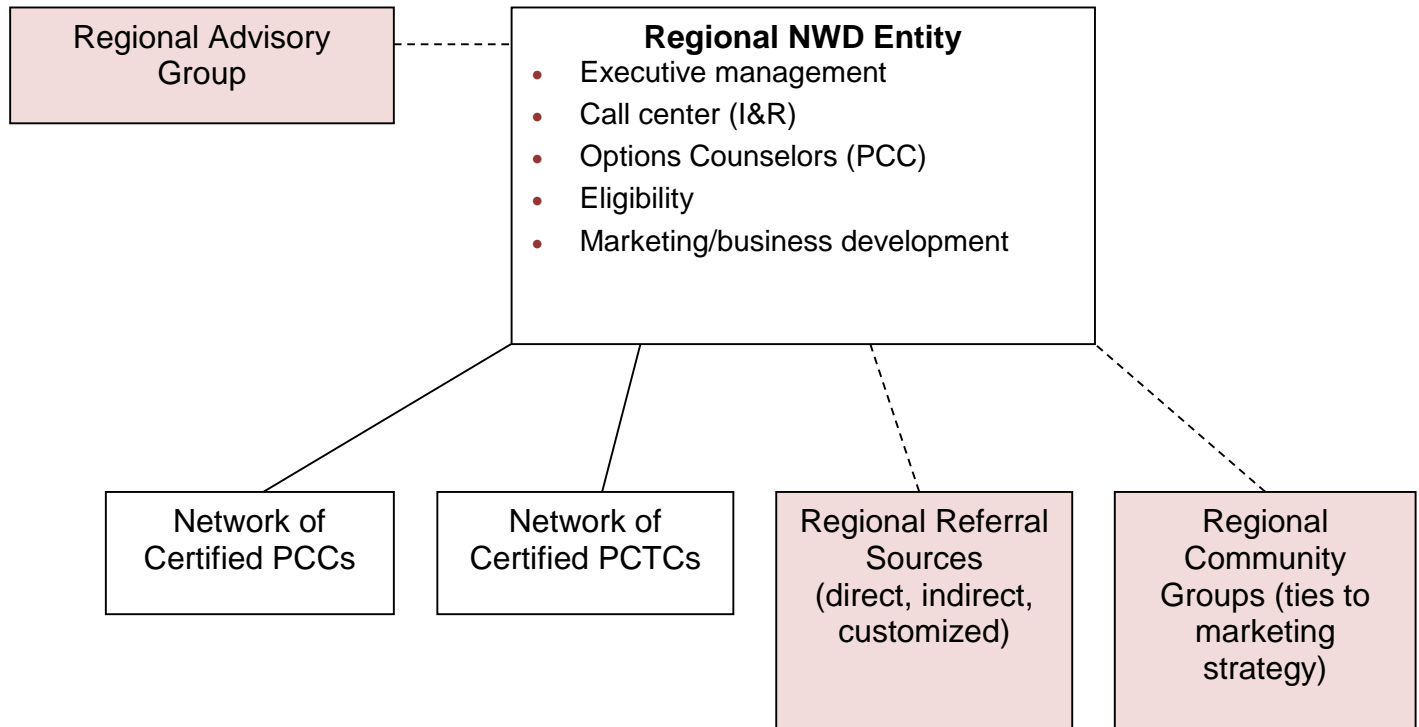## Structure: State and Regional Levels
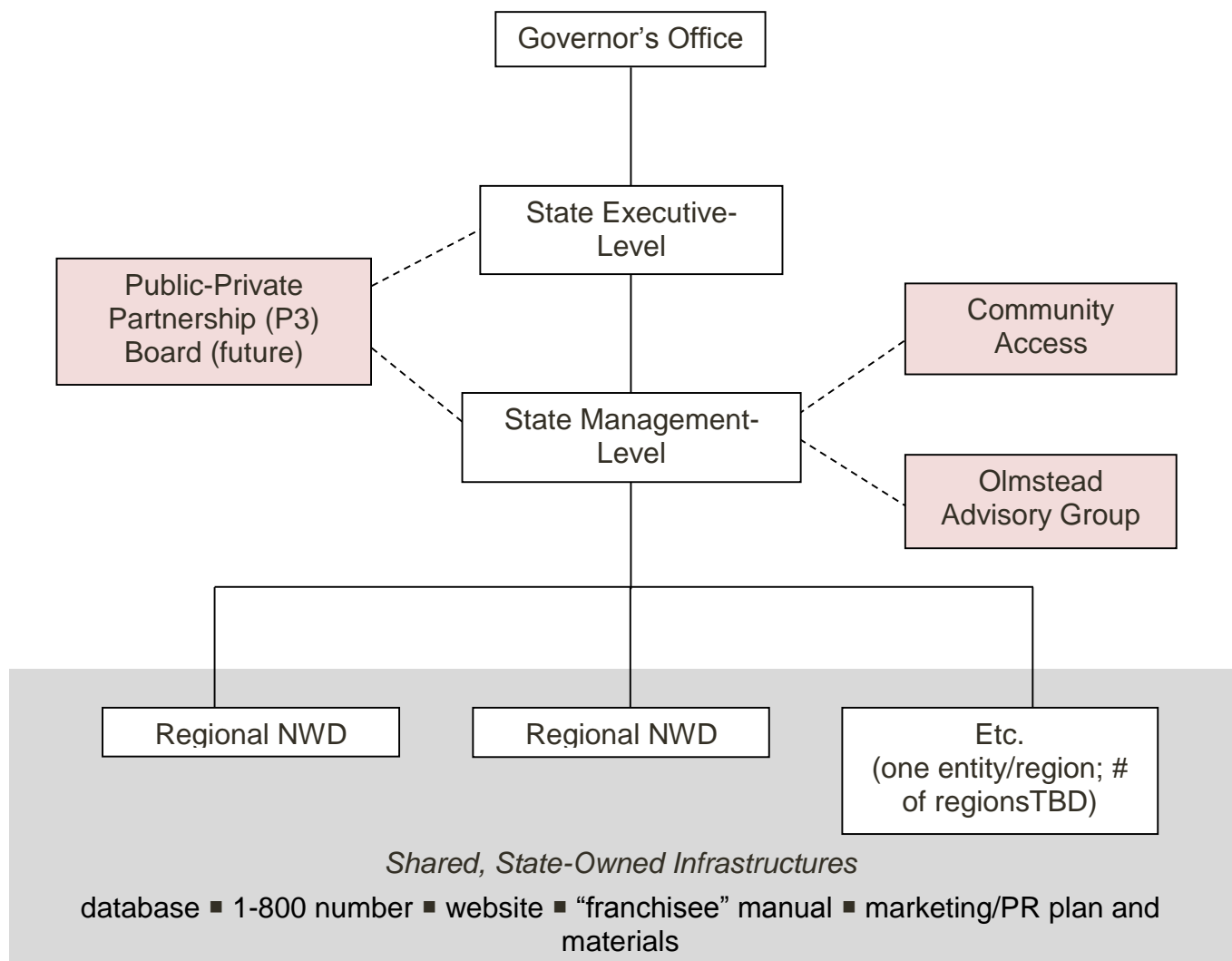
- Solid line = reporting relationship
- Dotted line = communication/coordination/advisory relationship

Our mission is to improve health care access and outcomes for the people we serve while demonstrating sound stewardship of financial resources.
www.colorado.gov/hcpf

Structure: Within Region

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│  Regional Advisory    │--------│  Regional NWD Entity                │
│  Group                │        │  • Executive management             │
└──────────────────────┘        │  • Call center (I&R)                │
                                 │  • Options Counselors (PCC)         │
                                 │  • Eligibility                      │
                                 │  • Marketing/business development   │
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- Network of Certified PCCs
- Network of Certified PCTCs
- Regional Referral Sources (direct, indirect, customized)
- Regional Community Groups (ties to marketing strategy)

Marketing and Referral Network

Consumer Target Markets

Consumer Segments	Needs/Interests/Desires
Maintainers: focused on maintaining independence	• LTSS can help me keep what I have • It will keep me out of the hospital/nursing facility • I can stay in my home
Continuers/Transitioners: already receiving services, but need to make changes	• LTSS can help me improve my situation (jobs, housing, etc.) • As a means to increasing my independence • To help me manage a change in circumstances/life stage
At Risks: need support to avoid transitioning to more restrictive setting	• LTSS as means to provide stability/adherence • As an option for those without enough/any natural supports • As things change over time, source of increased support

Uninformed Proactives: want support, but not certain how to proceed	• LTSS as a resource to manage crisis situations • I can learn what options are out there for me • I know I need help but don't know what's possible

Referral Network

Referral Source Type	Desired Action	A Few Examples
Direct	To contact NWD on consumer's behalf	• Hospital discharge coordinators • Nursing facilities • County eligibility offices
Custom	To customized how they refer based on the needs of individual consumers and/or to focus on referrals at key transition points	• School-related • Community NGO's (esp. human services, homeless services, etc.) • BHOs
Indirect	To give consumer NWD information and explain why they should connect	• AAAs, ADRCs, ILCs, RCCOs, CCBs, PACEs, etc. • Advocacy groups

Marketing Strategies (in sequence of implementation)
- Design the NWD system to meet the needs and interests of consumer markets
- Broad public relations/awareness campaign
- Targeted education within agencies and organizations that are likely referral sources
  - Education/information sharing strategies (to inform about NWD)
  - Ongoing communication strategies to keep NWD "top of mind"
- Connect via community organizations with which members of the target market Interact

Strategies/Markets/Referrals

NWD Marketing Strategies		Maintainers	Continuers/ Transitioners	At Risks	Uninformed Proactives
Design NWD with consumers in mind		X	X	X	X
Statewide public relations/awareness building campaign		X		X	X
Education and ongoing communication (top of mind)	Agencies/ direct referrals			X	
	Indirect referrals/ customized referrals		X		
Connect with consumers where they are in the community		X		X	X

Moving Forward

June – September

Date	Task	Who
June 5	Complete NWD draft plan segments	Aron and CHI
June 26	Schedule and hold a webinar with the Planning Advisory Group before the regional forums begin	Aron, Tim, CHI, Nonprofit Impact
	Submit draft plan to HCPF Budget Office to help them cost out the NWD model	Aron and Tim
June 30-July 31	Hold 5 regional public forums to vet draft	Project Team
August 14	Summarize and review input from public forums. Update draft plan. Submit to Steering Committee.	Project Team
September 25	Complete work plan and budget for first year of NWD implementation	Aron and Tim
	Create planning process summary and evaluation report	Aron and Nonprofit Impact

	Distribute NWD plan through Planning Advisory Group networks	Aron and PAG
	Post plan on state websites	Aron
September 29	Complete and submit final NWD plan	Aron

Coordinating with Other Initiatives

See handout from meeting #2

Regional Forums

- Five meetings: Western Slope, Central Mountains, Northern Front Range, Southern Front Range, Denver Metro
- Late June – late July
- Includes:
  - Review summary of NWD plan in PowerPoint format
  - Answer questions
  - Solicit input on specific topics and issues

Appendix: NWD Plan Outline (Summary)

No Wrong Door Implementation Plan

1. Mission and Vision
2. Consumer-Centered Process
    a. The process consumers experience when they access NWD services, includes person-centered counseling and streamlined access to public programs.
3. System Structure
    a. How the NWD system is organized to deliver a consumer-centered process in a standard and consistent manner across the state.
4. Governance and Administration
    a. The state-level leadership structure to implement NWD.

No Wrong Door Implementation Strategies

To achieve a consumer-centered, high-functioning NWD system, Colorado will employ seven strategies. These strategies outline how various aspects of the NWD system will be implemented over the first three years and beyond.

1. Workforce
    a. Sufficient number of qualified/certified staff to ensure comprehensive NWD access across Colorado.
2. Technology
    a. Reliance on high-tech, robust systems to collect and share consumer/provider information and monitor key quality metrics.
    b. Dynamic, up-to-date, locally-relevant resource database.
3. Business Systems
    a. Sophisticated management/leadership needed to deploy NWD, with the ability to run financial models/projections to inform decision making.
    b. Focus on developing new markets while also managing high volume operation.
4. Payment
    a. Identify new payment models and revenue streams for NWD and braid public funding streams.
    b. Develop fee for service/ billing/financial management systems.

5. Regulatory/Statutory

    a. Streamline statutes and regulations to enhance flexibility of NWD, especially around who determines eligibility.

    b. Sync up timelines for financial and functional eligibility determination.

6. Quality Assurance
   a. Consumer satisfaction is the focus of quality assurance evaluation with a strong independent evaluation and oversight.
   b. Includes process for on-going stakeholder engagement.

7. Marketing and Awareness
   a. Design NWD services with target markets in mind, including standardized information database.
   b. Launch PR/awareness campaign designed to reach certain target markets.
   c. Conduct targeted outreach and education to referral sources (direct and indirect).
   d. Connect with consumers beyond formal referral sources (faith-based communities, transportation, housing, etc.).